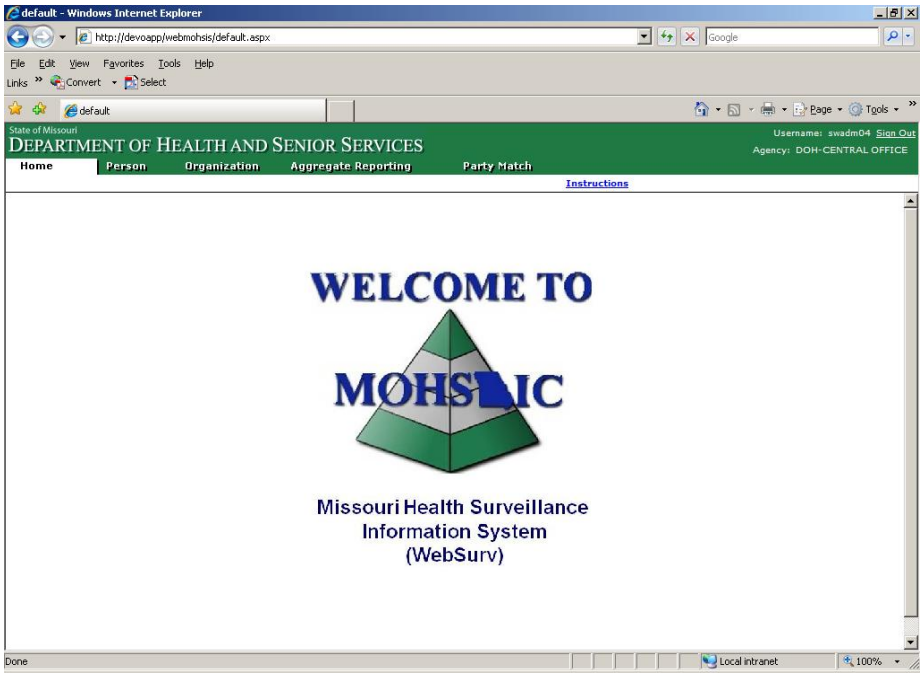
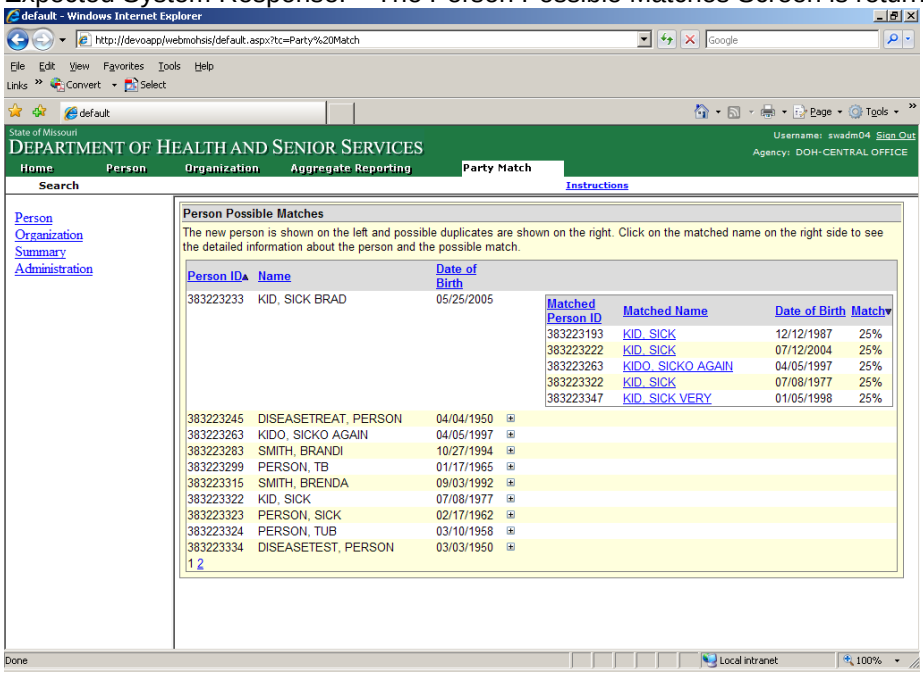
QA 1 – Complete Party Match

The following preconditions must be met:

1. Successful log into WebSurv application.

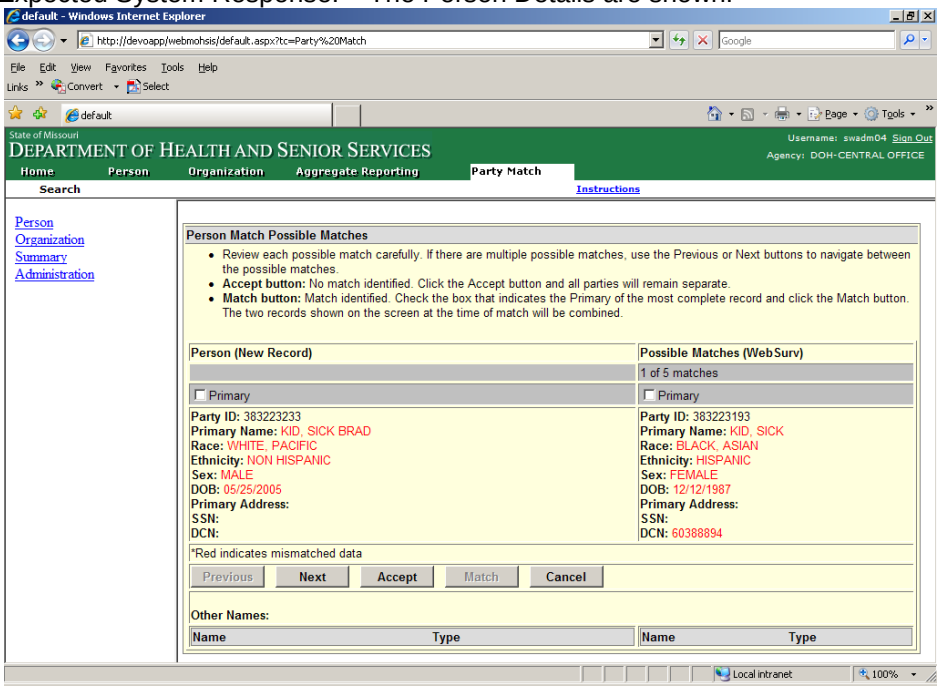


Procedure 1: Select Party Match on the Menu Bar
Expected System Response: The Person Possible Matches Screen is returned.



Procedure 2: Select the Matched Name in the right column.

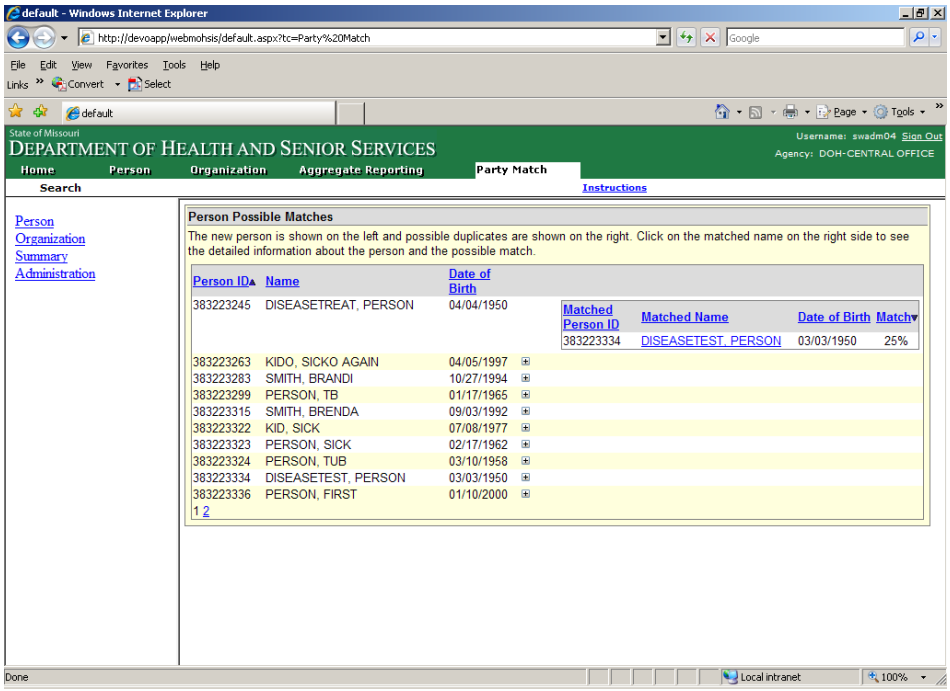
Expected System Response: The Person Details are shown.



NO MATCH IDENTIFIED.

Procedure 3: Click Next/Previous and review all the possible matches. Click ACCEPT button.

Expected System Response: Person Possible Matches Screen is returned. (The new record is accepted and removed from the screen.)



Procedure 4: Click Matched Name in right column.

Expected System Response: The Person Details Screen is shown.

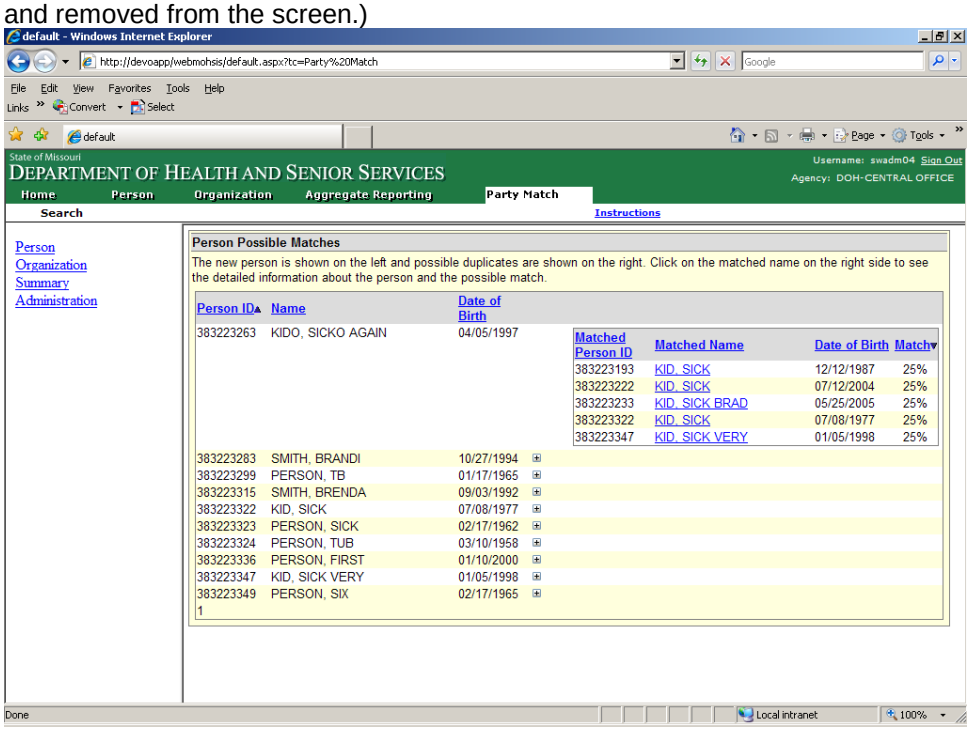
MATCH IDENTIFIED

Procedure 5: Review the information, Click PRIMARY box on the top of the most complete record.

Expected System Response: The MATCH button is available.

Procedure 6: Click Match.

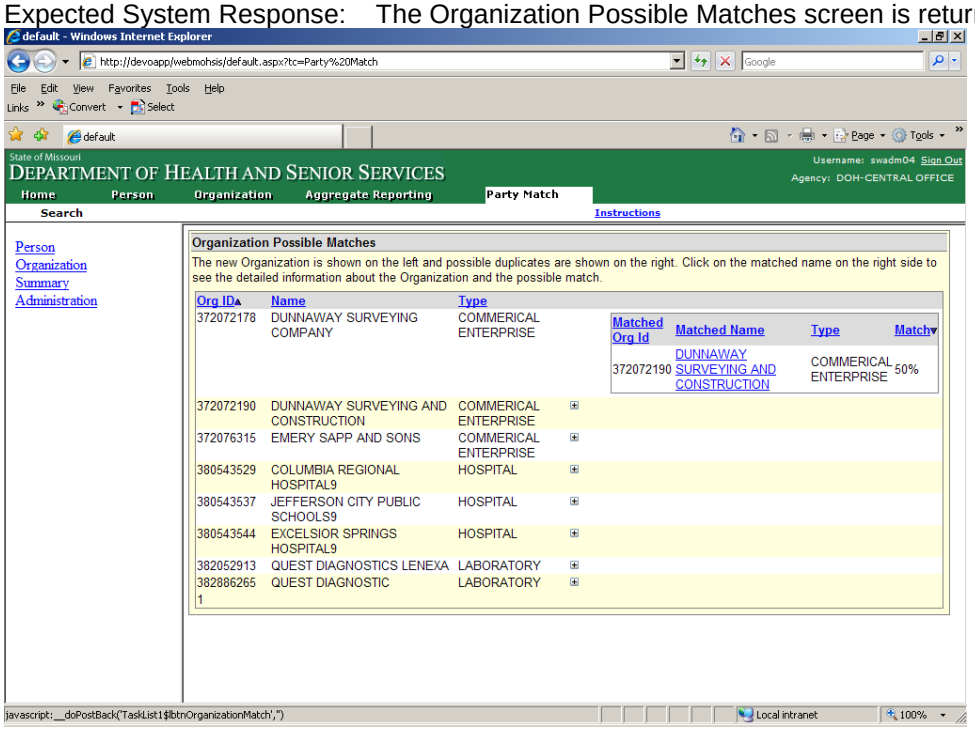
Expected System Response: The Person Possible Matches Screen is returned. (The records are combined and removed from the screen.)



ORGANIZATION POSSIBLE MATCH

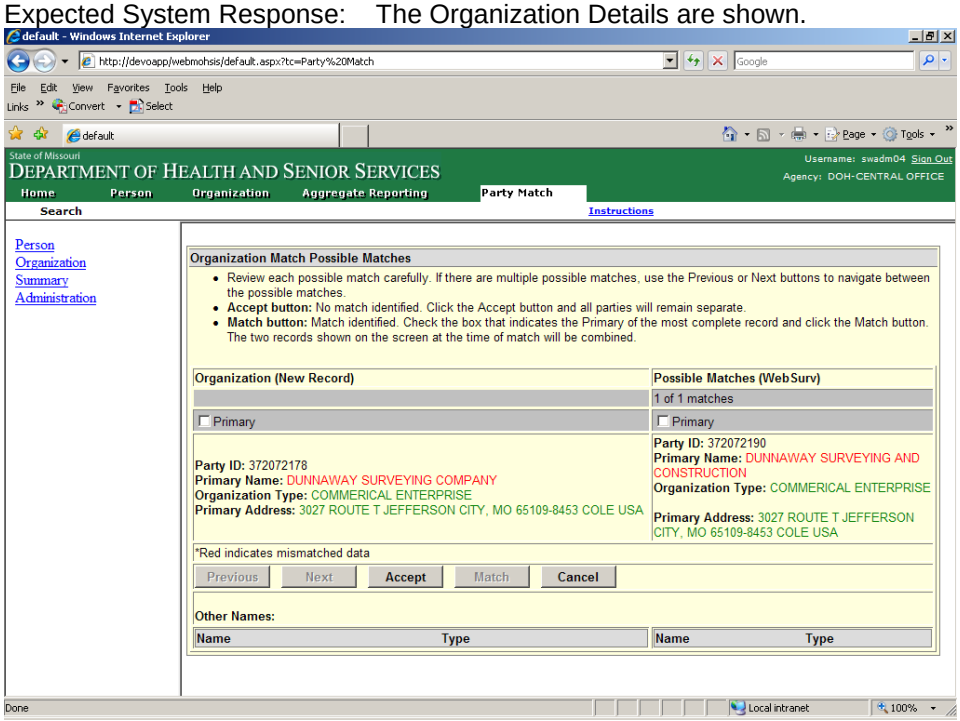
Procedure 7: Click Organization in the Treeview

Expected System Response: The Organization Possible Matches screen is returned.



Procedure 8: Click the Matched Name in the right column.

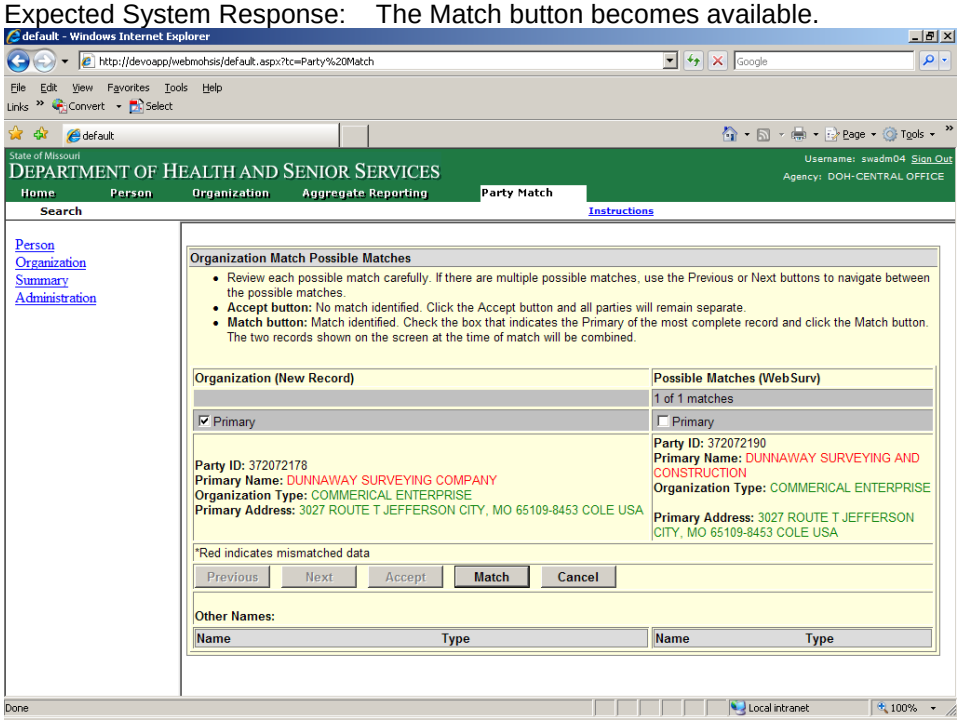
Expected System Response: The Organization Details are shown.



MATCH IDENTIFIED

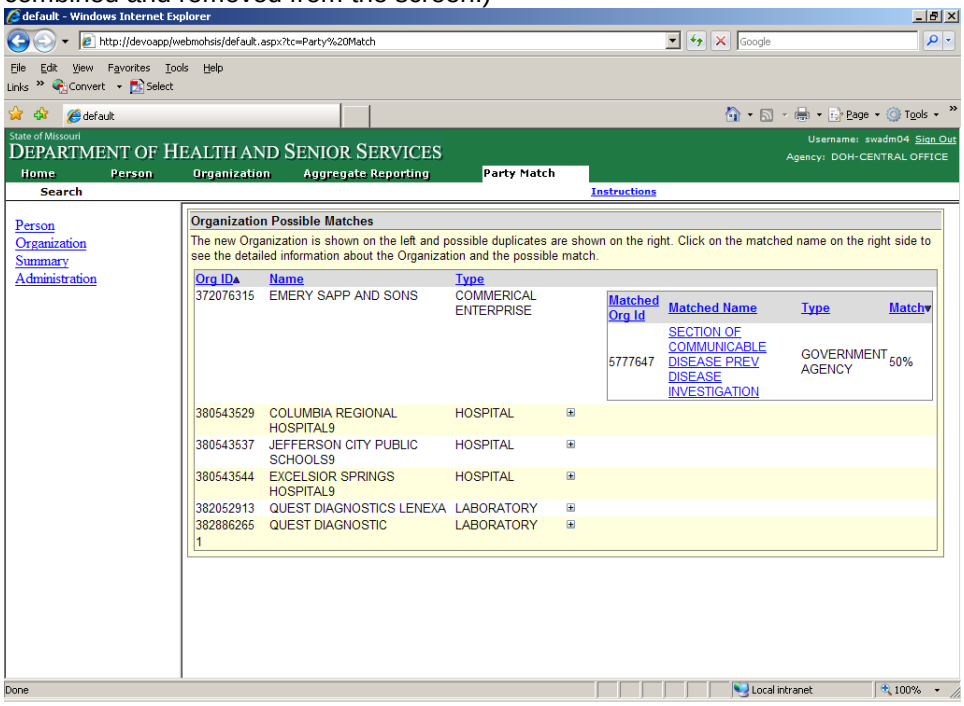
Procedure 9: Review all the possible matches. Click PRIMARY box above the most complete record.

Expected System Response: The Match button becomes available.



Procedure 10: Click Match

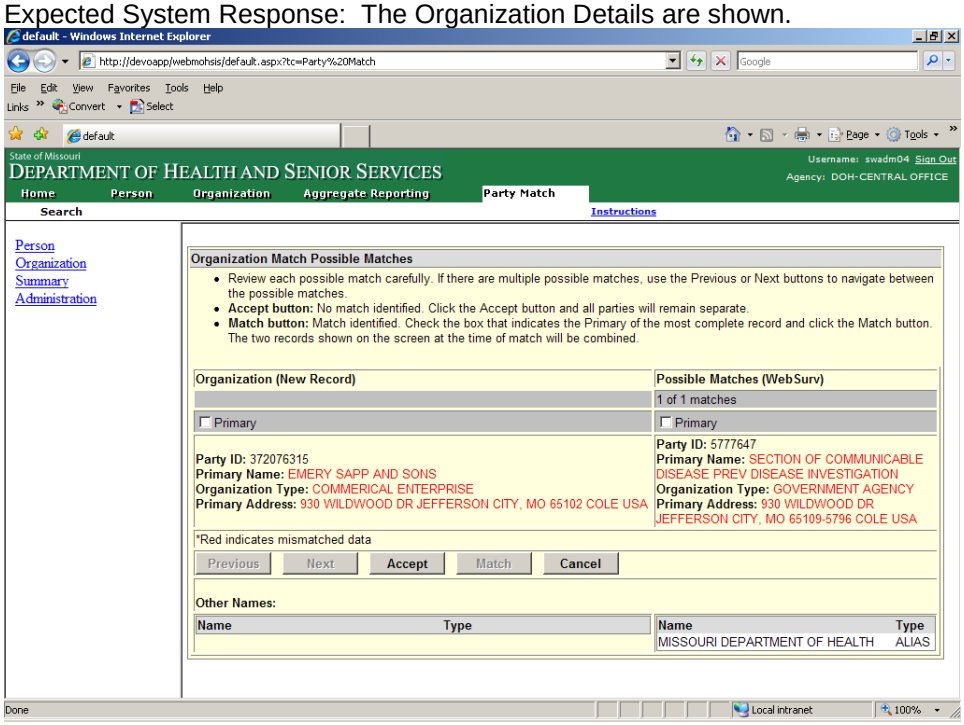
Expected System Response: The Organization Possible Matches Screen is returned. (The records are combined and removed from the screen.)



NO MATCH IDENTIFIED

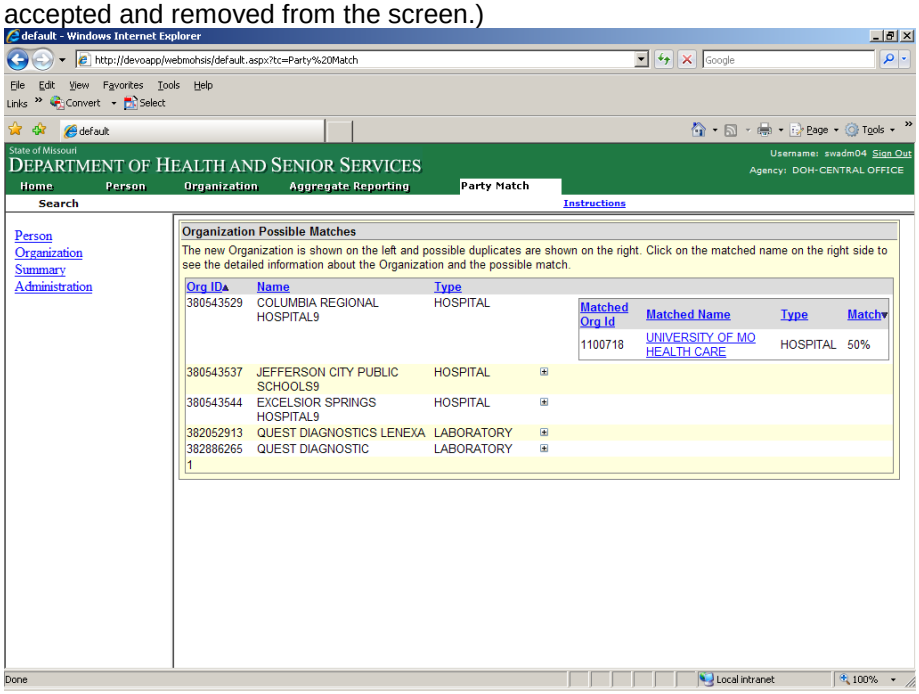
Procedure 11: Click on Matched Name in Right Column

Expected System Response: The Organization Details are shown.



Procedure 12: Review possible matches and click ACCEPT button.

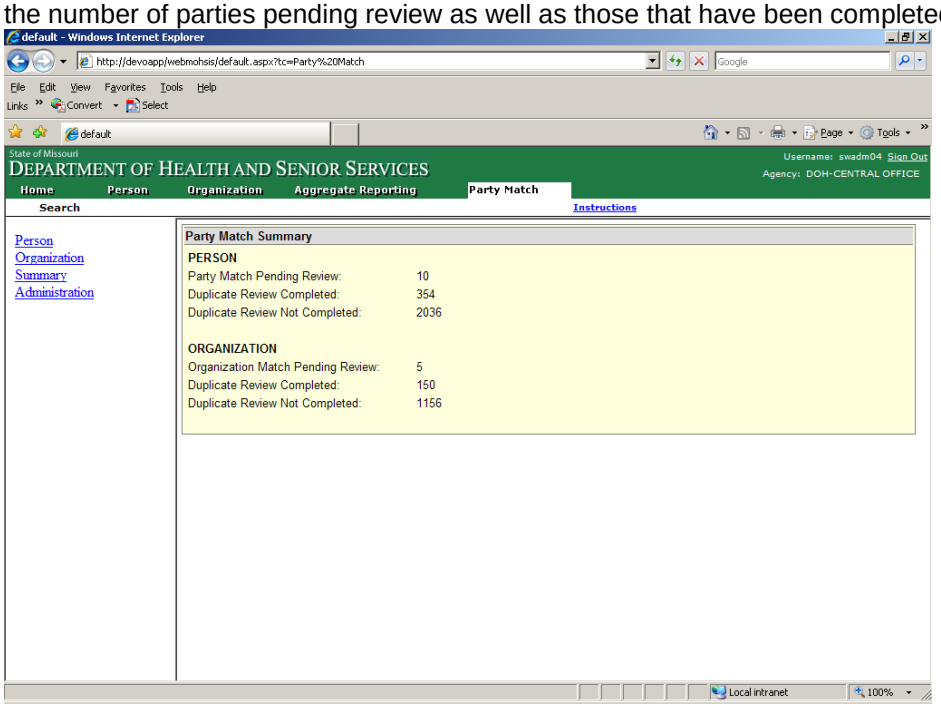
Expected System Response: The Organization Possible Matches Screen is returned. (The record is accepted and removed from the screen.)



SUMMARY

Procedure 13: Click Summary in the Treeview.

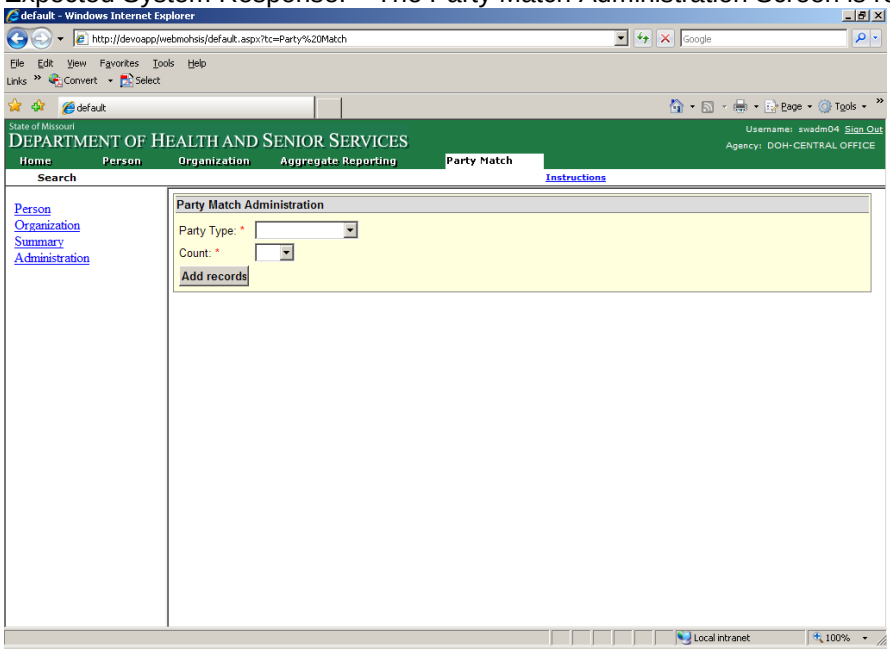
Expected System Response: The Party Match Summary Page is retuned. This page can be used to see the number of parties pending review as well as those that have been completed or not completed.



ADMINISTRATION (Admin Users Only)

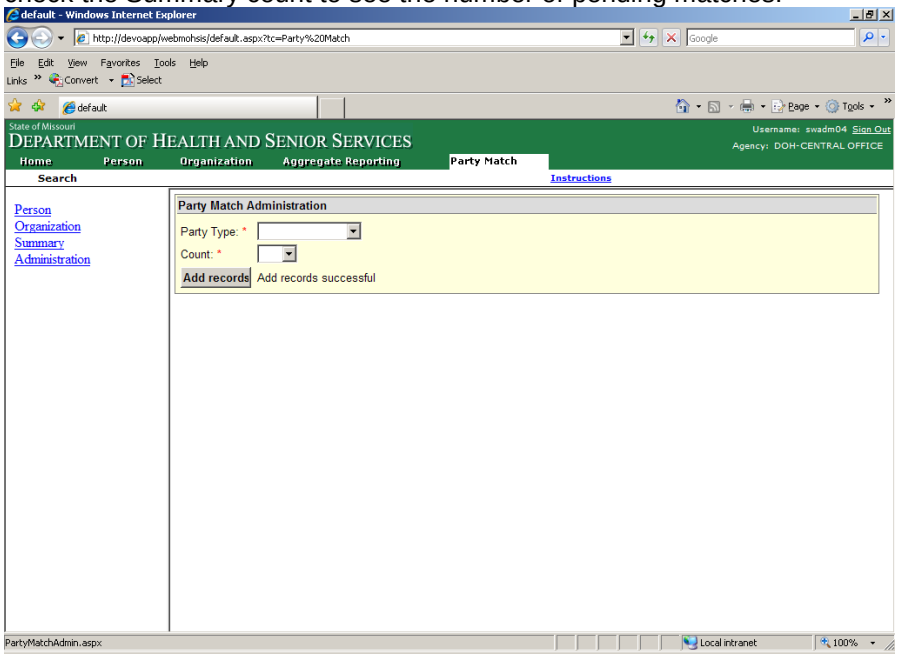
Procedure 14: Click Administration in the Treeview.

Expected System Response: The Party Match Administration Screen is returned.



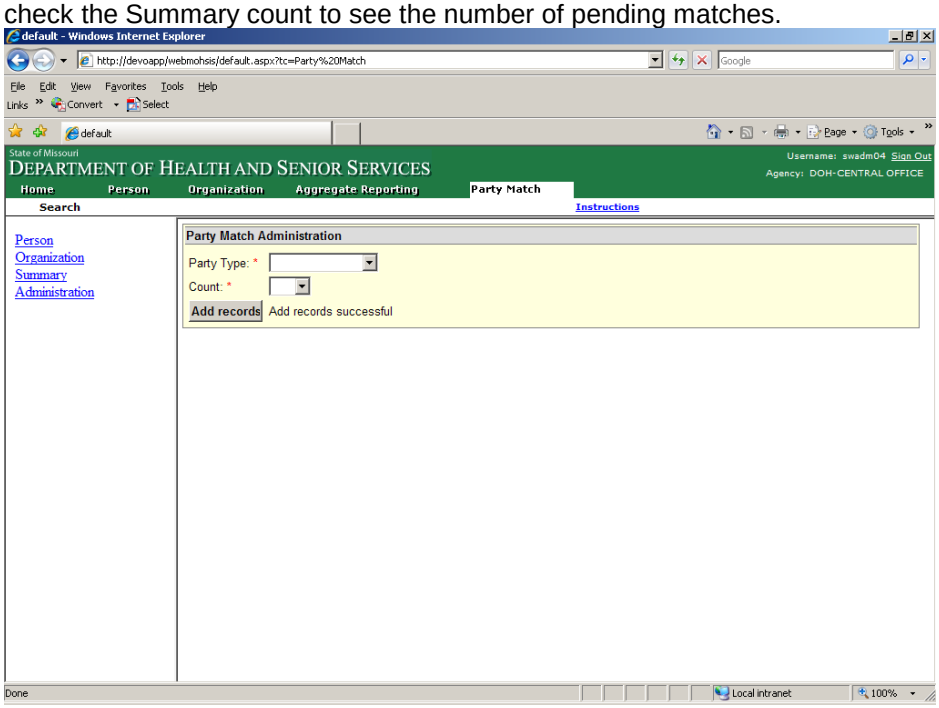
Procedure 15: Select PERSON in the Party Type dropdown, and select Count. Click Add records. COUNT determines the number of records that will be REVIEWED for possible matches.

Expected System Response: The screen is returned with message that “Add records successful”. You can check the Summary count to see the number of pending matches.



Procedure 16: Select ORGANIZATION in the Party Type dropdown, and select Count. Click Add records. COUNT determines the number of records that will be REVIEWED for possible matches.

Expected System Response: The screen is returned with message that “Add records successful”. You can check the Summary count to see the number of pending matches.



Test Complete